Chapter 3

Managing NDSR Projects

To enter data into NDSR, first create a project to organize the information in the form of records. Prior to creating a project, review your study protocol and methodology to determine the appropriate record type methodology to select. Once a record type is chosen for a project, it cannot be changed. Projects may contain records for only one of the twelve record types: Recalls, Records, Record-Assisted Recalls, Recalls with DSAM 24-hour intake, Recalls with DSAM 24-hour and past 30 days intake, Records with DSAM 24-hour intake, Records with DSAM 24-hour and past 30 days intake, Record-Assisted Recalls with DSAM 24-hour intake, Record-Assisted Recalls with DSAM 24-hour and past 30 days intake, User Recipes, DSAM User Products or Menus. Records with the same record type methodology may easily be copied or moved from one project to another. This option is also available for records with the same record type methodology from previous versions of NDSR, allowing the user to combine study records into one project for the generation of output files and/or averaged reports.

There is no limitation to the number of projects in NDSR or the number of records in a project. However, project number and size may impact the speed of the initial loading of NDSR and the backup, restore and output utilities. NCC recommends limiting project size to approximately 500 records.

NDSR projects may be organized into a system of folders with up to three sub-folder levels. The NDSR **Main Folder** is a default folder and may not be edited.   Folders, unlike projects may contain all record type methodologies allowing the user to organize project data by study.

This chapter describes:
- NDSR record types
- How to create a project in NDSR
- How to set project preferences
- How to sort projects and records
- How to copy records into a project
- How to edit project information
- How to delete a project from NDSR
- How to create a folder in NDSR
- How to move projects and folders into folders
- How to delete a folder from NDSR
- The NDSR Recycle Bin
- How to search for records in NDSR

NOTE: Find information about additional project management activities such as backing up and restoring data and generating output files in "*Chapter 9, NDSR Utilities*" and "*Chapter 8, Managing NDSR Output*".

NDSR Record Types:

Recalls

The intake record type `Recall` is used for collection of dietary data via an in-person interview or over the telephone. This record type allows the use of the multiple-pass approach with prompts displayed throughout the interview to assist in data collection. Spanish prompts are also available. The multiple-pass approach includes four passes (collect Quick List, review Quick List, collect detailed record information, and review detailed information). An optional pass to review a list of commonly Forgotten Foods can also be used when selected as a project-specific preference.

Records

The intake record type `Record` is used when entering dietary data in NDSR from hard-copy dietary intake forms. Prior knowledge of the NCC Food and Nutrient Database is beneficial when designing an intake form that will capture the specificity featured in NDSR (e.g., variable ingredients within recipes and preparation methods).

Record-Assisted Recalls

The intake record type `Record-Assisted Recall` is used when 24-hour dietary data is entered into NDSR using a hard-copy dietary intake form as an aid to the in-person or phone interview. Spanish prompts are available.

Recalls, Records or Record-Assisted Recalls with DSAM

The Dietary Supplement Assessment Module (DSAM) may be selected when your study protocol includes the collection of dietary supplement data in addition to dietary intake records.   Dietary supplement intake may be collected for the 24-hour intake or for the 24-hour intake and the past 30-day intake. Spanish prompts are available for Recalls with DSAM and Record-Assisted Recalls with DSAM.

User Recipes

The record type `User Recipe` is most commonly used for study-specific recipes, new-food resolutions, and basic recipe analysis. Once created, User Recipes can later be selected from the **Food Search** window and inserted into other record types (e.g., intake records). User Recipes contain ingredient details, the number of servings made, and the number of servings eaten.

Menus

The record type `Menu` is used to enter food records or menus that are offered to a certain population group (e.g., school meal menus, menus for feeding studies, and menus for long- term care facilities).

DSAM User Products

Similar in concept to the `User Recipe` record type, the `User Product` record type is used to enter dietary supplements and antacids that are not found in the DSAM Database. After creating a User Product record in DSAM, the user may then decide to make the User Product available in the DSAM Database. Once the User Product is created and added to the DSAM Database, User Products may be selected and inserted into the DSAM portion of an NDSR intake record.

Creating a Project

You must create a new project before you can set project preferences. Create a new project on the **Folder, Project and Record Selection** window.
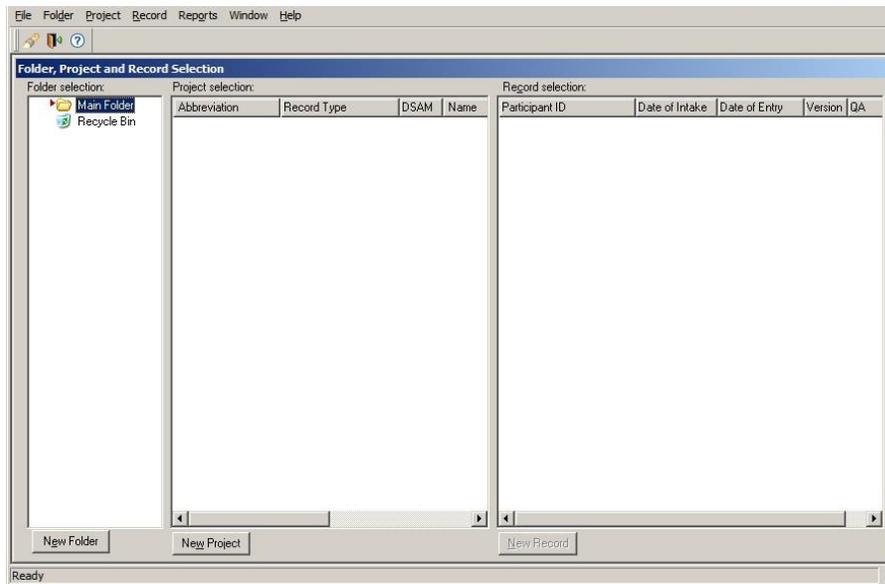
The following steps describe how to create a project in NDSR.

1. When you receive the **Folder, Project and Record Selection** window, either select **Project→New** or select the NEW PROJECT button on the **Project selection** pane.

2. When you receive the **Project Information** window, you will note that the `Folder:` field will indicate the folder highlighted on the **Folder selection** pane of the **Folder, Project and Record Selection** window. The NDSR **Main Folder** is a default folder and may not be edited. If you have previously created additional folders and want this new project to be located in a specific folder, select the folder from the drop-down list. NDSR folders are discussed further in a following section: "*Creating a Folder*". Next enter a project name in the `Project Name:` field (up to 50 characters).

NOTE: All project names must be unique.

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3. Move the cursor to the `Project Abbreviation:` field and enter an abbreviation for this project (up to seven characters).

NOTE:	All project abbreviations must be unique.

4. Move the cursor to the `Record Type:` field and select a record type from the drop-down list.

NOTE:	You cannot change a project's record type once you have added a record to that project.

5. To add the Dietary Supplement Assessment Module (DSAM) to dietary intake recall, record, or record-assisted recall methodologies, select the **24-HOUR INTAKE** or **24-HOUR AND PAST 30 DAYS INTAKE** radio button.

6. Type any relevant notes in the `Notes:` field. All text entered here will appear on the **Project List** Report.

7. Select the **PREFERENCES** button to view and edit the project specific **Method, Customizable Data Fields, Dietary Supplements**, and **Project** tabs. Preferences selected on these tabs apply to single projects. On the **User** tab view and specify preferences that will apply to all projects in NDSR. Project preferences are discussed further in the following section: "*Setting Project Preferences*".

8. To add a project to the list in the **Project selection** pane, select the **OK** button.

Setting Project Preferences

To set project preferences select the **PREFERENCES** button on the **Project Information** window or select **File→Preferences** from the menu bar. NDSR users may specify the following project preferences:

- *Method Preferences* define **Header** tab display, format and other requirements specific to the project's record type.

- *Customizable Data Fields Preferences* allow you to set customized data field descriptors and an optional character limit for data fields on the **Header** tabs of Intake Records, Menus, and User Recipes, and for data fields on the **Trailer** tabs of Intake Records.

- *Dietary Supplements Preferences* allow for the selection of additional supplement use questions required for your protocol.

- *Project Preferences* define the default directories for backup, export, output, and reports folders, and the introduction script file name.

- *User Preferences* define which NDSR window opens first, the shading during food search and the option of including column headers when generating output files.

Setting Method Preferences
The **Method** tab defines NDSR data collection and entry requirements. The method preferences that may be set are dependent on the record type selected for the project. All records within a project have the same preferences. A project's method preferences may be changed after the project has begun.

NOTE: If you change method preferences after records have been inserted in a project, be sure to edit previously entered records according to the new preferences.

The following steps describe how to set method preferences.

1. To set project method preferences select the **PREFERENCES** button on the **Project Information** window or select **File→Preferences** from the menu bar.

2. When you receive the **Preferences** window, select the **Method** tab.

NOTE: ID is required for all records and is not a preference. Date is required for intake and menu records and is not a preference. Serving size description is required for User Recipes and is not a preference.

Customize the **Header** tab by selecting the required fields on the **Method** tab.
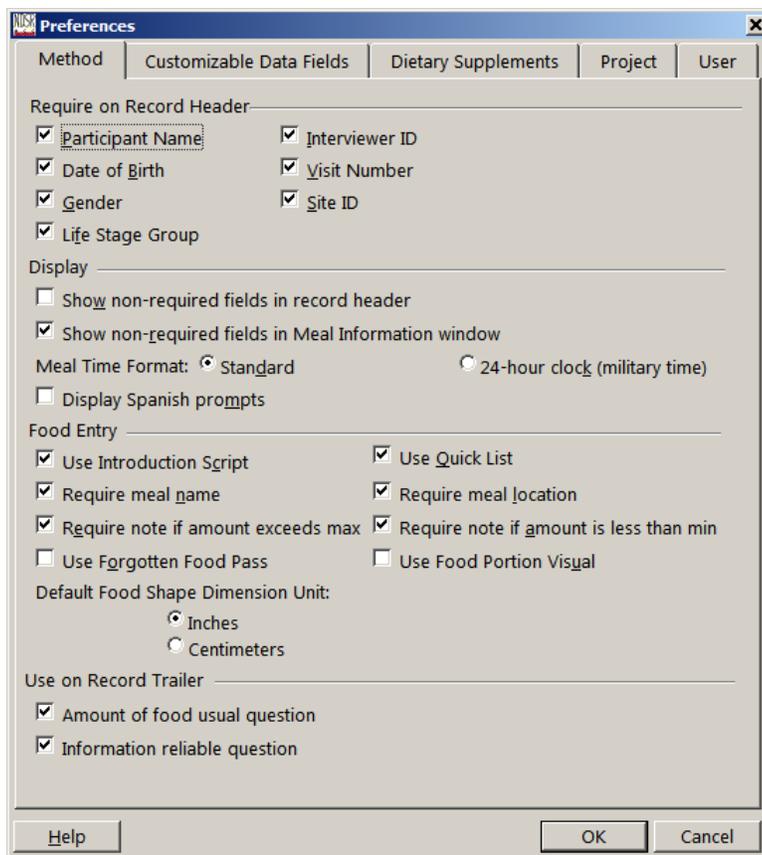
The following fields can be set as **Intake Record Header** tab preferences:
- Participant name
- Date of birth
- Gender
- Life Stage Group
- Interviewer ID
- Visit number
- Site ID

The following display, food entry options, and record trailer questions can be set:
- Show non-required fields in record header
- Show non-required fields in Meal Information window
- Meal time format
- Display Spanish prompts
- Use Introduction Script
- Use Quick List
- Require meal name
- Require meal location
- Require note if amount exceeds maximum
- Require note if amount is less than minimum
- Use Forgotten Food Pass
- Use Food Portion Visual (protocol specific)
- Default food shape dimension unit
- Use Trailer Questions

NOTE: Requiring a note when a questionable amount is entered is one of the quality assurance features in NDSR. NCC has designated the general guidelines of greater than 4 times a serving and less than $1/8^{th}$ a serving, as the amounts that would require a note.

NOTE: The default food shape dimension unit can be selected as either inches or centimeters. Regardless of which unit is selected as the default, the user has the option to change the unit for when entering the amount of each food.

The following fields can be set as **User Recipe Record Header** tab preferences:
- Recipe name
- Site ID
- Version
- Interviewer ID

The following display, food entry, and customized data fields requirements can be set:
- Show non-required fields in recipe header
- Require note if amount exceeds maximum
- Require note if amount is less than minimum
- Use Food Portion Visual (protocol specific)
- Default food shape dimension unit

NOTE: The default food shape dimension unit can be selected as either inches or centimeters. Regardless of which unit is selected as the default, the user has the option to change the unit for when entering the amount of each food.

NOTE: Requiring a note when a questionable amount is entered is one of the quality assurance features in NDSR. NCC has designated the general guidelines of greater than 4 times a serving and less than 1/8th a serving, as the amounts that would require a note.

The following fields can be set as **Menu Record Header** tab preferences:

- `Menu name`
- `Version`
- `Interviewer ID`
- `Site ID`

The following display, food entry, and customized data fields requirements can be set:

- `Show non-required fields in menu header`
- `Show non-required fields in Meal Information window`
- `Meal time format`
- `Use Quick List`
- `Require meal name`
- `Require meal location`
- `Require note if amount exceeds maximum`
- `Require note if amount is less than minimum`
- `Use Food Portion Visual (protocol specific)`
- `Default food shape dimension unit`

NOTE: The default food shape dimension unit can be selected as either inches or centimeters. Regardless of which unit is selected as the default, the user has the option to change the unit for when entering the amount of each food.

NOTE:	Requiring a note when a questionable amount is entered is one of the quality assurance features in NDSR. NCC has designated the general guidelines of greater than 4 times a serving and less than 1/8th a serving, as the amounts that would require a note.

The following field can be set as **User Product Record Header** tab preferences:
- `Interviewer ID`
- `Show non-required fields in product header`

3. Choose whether non-required fields will appear on the **Header** tab. .

4. For intake and menu records, specify how NDSR is to format meal times. Choose between **STANDARD** and **24-HOUR CLOCK**. NDSR defaults to **STANDARD**.

For intake and menu records, specify food-entry preferences. Additional preferences for recalls and record-assisted recalls include use of the Introduction Script and the Forgotten Foods Pass.

NOTE:	These preferences include: use of the **Quick List** window when entering data; requirement of a note when an amount exceeds the maximum set in the NCC Food and Nutrient Database; requirement of a meal name and/or a meal location on the **Meal Information** window.

5. When you have selected the appropriate preferences for a project, select the **OK** button to save your changes.
- If you do not want to save the project's method preferences, select the **CANCEL** button.
- To set other preferences, select the appropriate tab.

Setting Customizable Data Fields Preferences

The **Customizable Data Fields** tab is found in Recall, Record, Record-Assisted Recall, Menu, and User Recipe Project Preferences. Intake Records have five optional Customizable Data Fields on the **Header** tab and three Customizable Data Fields on the **Trailer** tab. Menu and User Recipes have five Customizable Fields on the **Header** tab but do not have any on the **Trailer** tab. These fields are optional and if the descriptors are left blank, the customizable fields will not display on the record **Trailer** or **Header** tabs.

The following steps describe how to set method preferences.

1. To use the Customizable Data Fields, select the **PREFERENCES** button on the **Project Information** window or select **File→Preferences** from the menu bar.

2. When you receive the **Preferences** window, select the **Customizable Data Fields** tab.

3. Customize the **fields** by typing a descriptor into the Header or Trailer Data Field Descriptor: Field. The custom descriptor can be up to 27 characters long.

NOTE: A customizable field must have a descriptor if it is to be displayed. Once a descriptor is typed into the Data Field Descriptor: Field, the DISPLAY checkbox will become checked.

4. To limit the number of characters that can be entered into the Header Data Field or Trailer Data Field, type a positive integer less than 100 into the Character Limit: Field.

NOTE: If no number is typed in to the Character Limit: Field, up to 100 characters can be entered into the Data Field on the **Header** or **Trailer** tab.

5. To require that a response be entered for a customizable field in each record before continuing to the next window, check the REQUIRED checkbox.

   The following fields can be set as **Intake Record Header** tab and **Trailer** tab preferences:

   - Header Data Field 1 Descriptor
   - Header Data Field 1 Character Limit
   - Require Header Data Field 1
   - Header Data Field 2 Descriptor
   - Header Data Field 2 Character Limit
   - Require Header Data Field 2

- Header Data Field 3 Descriptor
- Header Data Field 3 Character Limit
- Require Header Data Field 3
- Header Data Field 4 Descriptor
- Header Data Field 4 Character Limit
- Require Header Data Field 4
- Header Data Field 5 Descriptor
- Header Data Field 5 Character Limit
- Require Header Data Field 5
- Trailer Header Data Field 1 Descriptor
- Trailer Header Data Field 1 Character Limit
- Require Trailer Data Field 1
- Trailer Header Data Field 2 Descriptor
- Trailer Header Data Field 2 Character Limit
- Require Trailer Data Field 2
- Trailer Header Data Field 3 Descriptor
- Trailer Header Data Field 3 Character Limit
- Require Trailer Data Field 3

The following fields can be set as **User Recipe Header** tab preferences:

- Header Data Field 1 Descriptor
- Header Data Field 1 Character Limit
- Require Header Data Field 1
- Header Data Field 2 Descriptor
- Header Data Field 2 Character Limit
- Require Header Data Field 2
- Header Data Field 3 Descriptor
- Header Data Field 3 Character Limit
- Require Header Data Field 3
- Header Data Field 4 Descriptor
- Header Data Field 4 Character Limit
- Require Header Data Field 4
- Header Data Field 5 Descriptor
- Header Data Field 5 Character Limit
- Require Header Data Field 5

The following fields can be set as **Menu Header** tab preferences:

- Header Data Field 1 Descriptor
- Header Data Field 1 Character Limit
- Require Header Data Field 1
- Header Data Field 2 Descriptor
- Header Data Field 2 Character Limit
- Require Header Data Field 2
- Header Data Field 3 Descriptor
- Header Data Field 3 Character Limit
- Require Header Data Field 3
- Header Data Field 4 Descriptor
- Header Data Field 4 Character Limit

- `Require Header Data Field 4`
- `Header Data Field 5 Descriptor`
- `Header Data Field 5 Character Limit`
- `Require Header Data Field 5`

Setting Dietary Supplements Preferences

The following steps describe how to set dietary supplement preferences.

1. To set project DSAM preferences select the **PREFERENCES** button on the **Project Information** window or select **File→Preferences** from the menu bar.

2. When you receive the **Preferences** window, select the **Dietary Supplements** tab.

3. The following can be set as DSAM interview and data entry preferences:

    Require Additional Supplement Use Questions
    - `Reason for Use`
    - `Recommended By`
    - `Place of Purchase`
    - `Perceived Effectiveness`
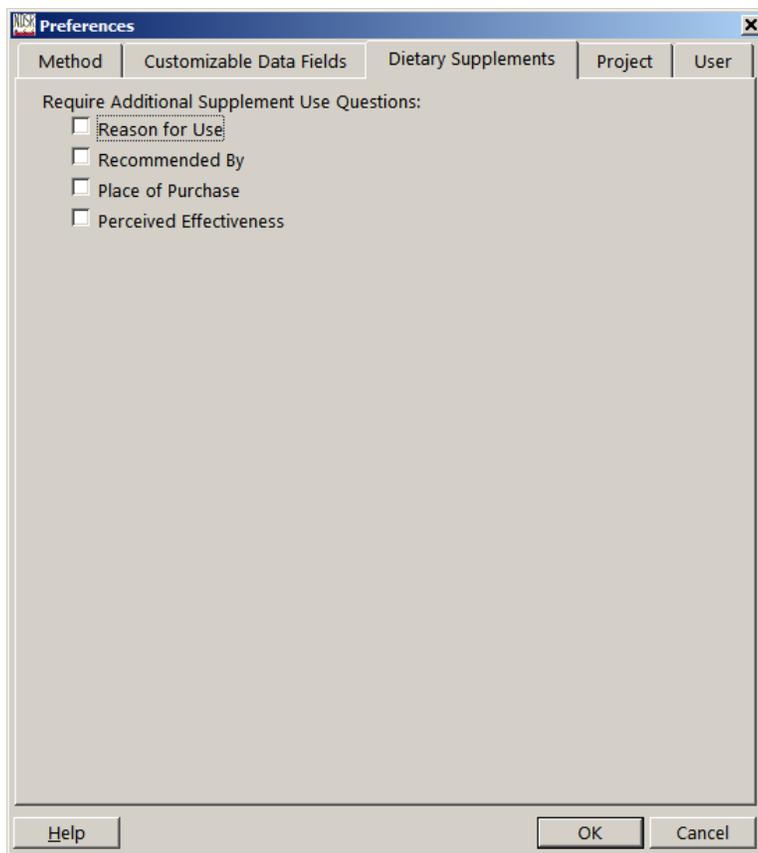
4. When you have selected the DSAM preferences for a project, select the **OK** button to save your changes.
    - If you do not want to save the dietary supplements preferences, select the **CANCEL** button.
    - To set other preferences, select the appropriate tab.

Setting User Preferences

The **Project Preferences** tab specifies the project specific directories for output, backup, export, report folders, the location of the Introduction Script and Spanish Introduction Script.
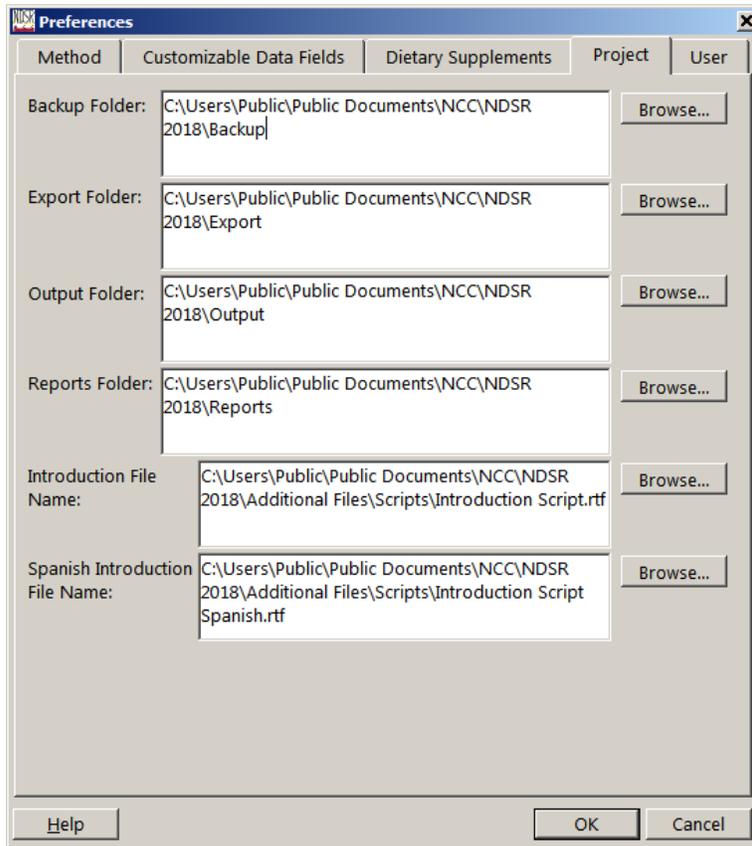
The following steps describe how to set Project Preferences.

1. To set project user preferences select the **PREFERENCES** button on the **Project Information** window or select **File→Preferences** from the menu bar.

2. When you receive the **Preferences** window, select the **Project** tab.

3. Specify the directory for the Backup folder. This is where the backup files for all projects will be stored.

4. Specify the directory for the Export folder. This is where exported record header files for all projects will be stored.

5. Specify the directory for the Output folder. This is where the output files for all projects will be stored.

6. Specify the directory for the Reports folder. This is where reports for all projects will be stored.

NOTE: The **BROWSE** button allows the user to browse for a folder within their particular system or network.

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7. Specify the Introduction file name for the Introduction Script.

NOTE: The default script is found in the following location: `C:\Users\Public\Public Documents\NCC\NDSR 2018\Additional Files\Scripts\Introduction Script.rtf`. Go to the location of this file on your computer, select Save As and edit to customize for your study, changing the Introduction file name to easily identify the study where it will be used. See the following example where the Introduction Script has been changed to Intro Kids Like to Eat.rtf

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8. Specify the Spanish Introduction file name for the Introduction Script-Spanish. This will be used for all projects.

NOTE: The default script is found in the following location: `C:\Users\Public\Public Documents\NCC\NDSR 2018\Additional Files\Scripts\Introduction Script Spanish.rtf`. Go to the location of this file on your computer, select Save As and edit to customize for your study, changing the Introduction file name to easily identify the study where it will be used. See the following example where the Introduction Script has been changed to Introduction Script Spanish.rtf

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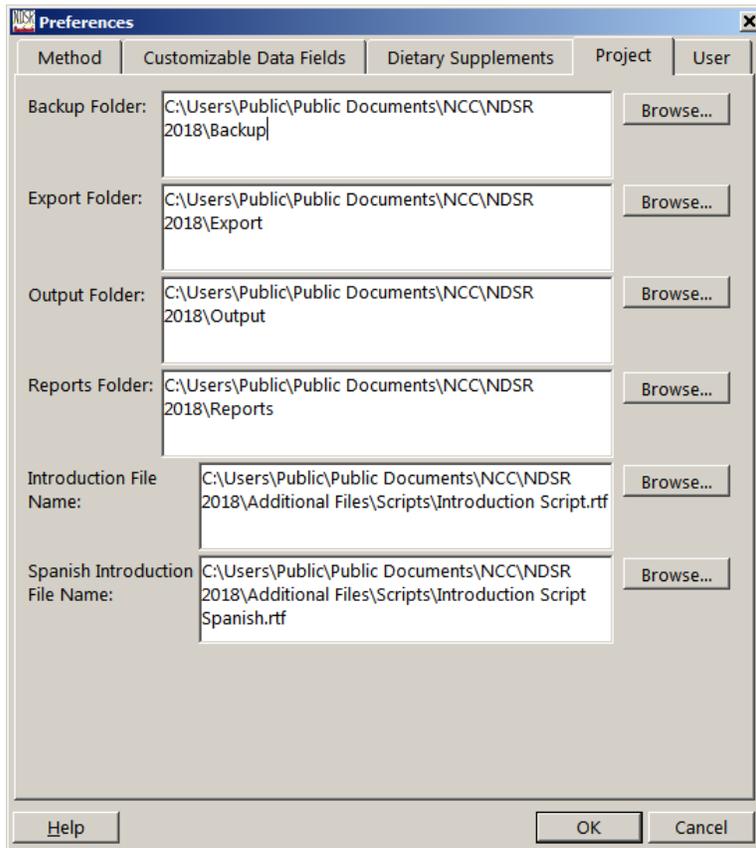
9. When you have selected the appropriate project preferences, select the **OK** button to save your changes.
   - If you do not want to save changes to a project's preferences, select the **CANCEL** button.
   - To set all other preferences, select the appropriate tab.

The **User** tab specifies which window opens first when you access NDSR, the percentage shading applied to the **Food Search** window and the option of including column headers when generating output files. These preferences apply to all projects.
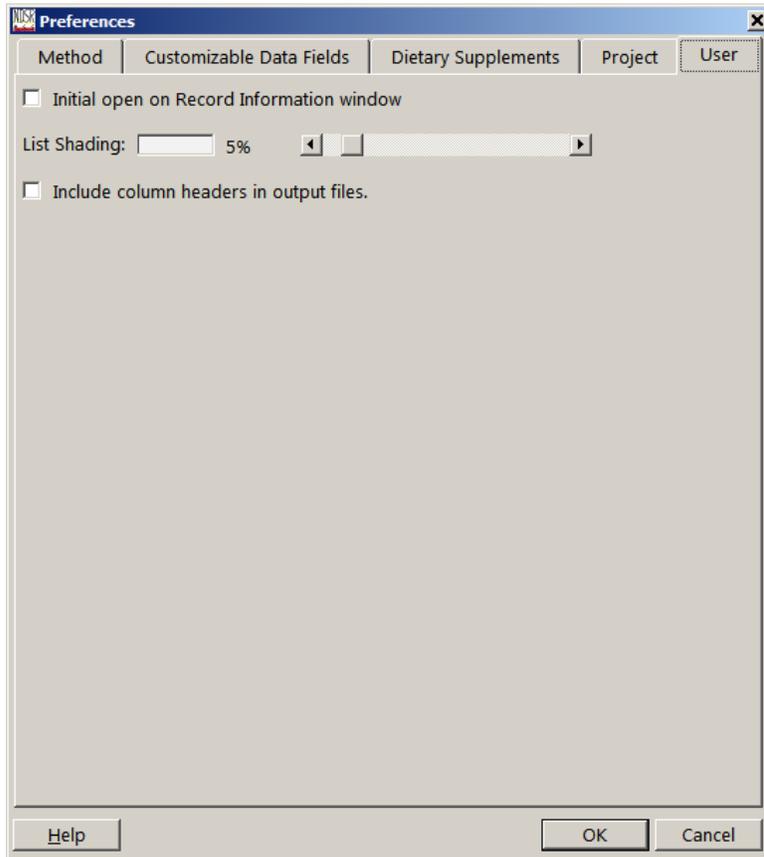
The following steps describe how to set User Preferences.

1. To set project user preferences select the **PREFERENCES** button on the **Project Information** window or select **File→Preferences** from the menu bar.

2. When you receive the **Preferences** window, select the **User** tab.

3. Specify which screen you will see first when you start NDSR.
   - If you want the **Record Information** window to open first when you start NDSR, select the checkbox.
   - If you want the **Folder, Project and Record Selection** window to open first when you start NDSR, deselect the checkbox.

4. Select the **INCLUDE COLUMN HEADERS IN OUTPUT FILES** checkbox to have all the column headers included when you generate output files.

5. When you have selected the appropriate user preferences, select the **OK** button to save your changes.
   - If you do not want to save changes to a project's user preferences, select the **CANCEL** button.
   - To set other preferences, select the appropriate tab.

Sorting Projects and Records

The **Folder, Project and Record Selection** window includes the **Folder selection** pane, **Project selection** pane and the **Record selection** pane. Within the **Project selection** pane and the **Record selection** pane are columns. By selecting a column header with the mouse, you may sort your projects or records alphabetically or numerically by the column header variable.

Copying and Moving Records into a Project

To copy records into a new or existing project, use the **Save Record As** function. A copy of the chosen records will remain in the original project.

To move records into a new or existing project, use the **Move** function. The chosen records will literally be moved from one project to another.

NOTE:	If you attempt to move or copy a record to a project that already contains the record, you will receive a **Duplicate Record** dialog box. You will need to decide if you want to overwrite the duplicate.

Copying Records
The following steps describe how to copy records into a new or existing project.

1. Create a new project in NDSR unless the project to which you want to copy records already exists.

NOTE:	You will only be allowed to copy records into a project that has the same record type.

2. Select the project that contains the record(s) you want to copy. Then highlight the record(s) you want to copy. To highlight more than one record, press the **SHIFT** key or the **CTRL** key and select with the mouse the records you want to select. To do this with the keyboard only, hold the **SHIFT** or **CTRL** key + ↑or ↓. Use the **SPACE BAR** to select the record(s).

3. Select **Record→Save As**. When you receive the **Save Record As** dialog box, select the project to which you want to copy the record from the drop-down list in the `Project:` field. Only projects with the same record type will be listed.
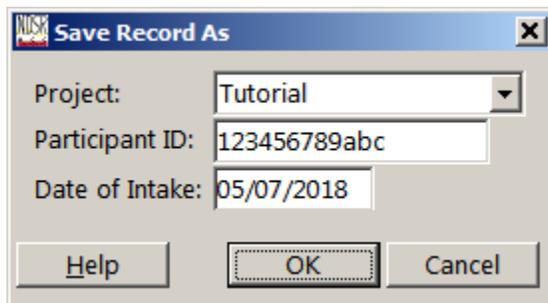
4. To change the participant or record ID, type the new ID in the `ID:` field.

NOTE:	Within a project, all record ID and date combinations must be unique. For a User Recipe, the record ID must be unique across all projects.

5. To change the date of intake or record date, type the new date in the `Date:` field.

6. To copy the selected record(s) to the new project, select the **OK** button. To cancel the copy operation, select the **CANCEL** button.

NOTE: You may save a record to the same project if the ID or date is changed.

Moving Records
The following steps describe how to move records into a new or existing project.

1. Create a new project in NDSR unless the project to which you want to move records already exists.

NOTE: You will only be allowed to move records to a project that has the same record type.

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2. Select the project that contains the record(s) you want to move. Then highlight the record(s) you want to move. To highlight more than one record, press the **SHIFT** key or the **CTRL** key and select with the mouse the records you want to move. To do this with the keyboard only, hold the **SHIFT** or **CTRL** key + ↑or ↓. Use the **SPACE BAR** to select the record(s).

3. Select **Record→Move**. When you receive the **Move Record to Project** dialog box, select the project to which you want to move the record from the drop-down list. Only projects with the same record type will be listed.

4. To move the selected record(s) to the new project, select the **OK** button. To cancel the move operation, select the **CANCEL** button.

Editing a Project

Any time after creating a project, you may edit a project's name, abbreviation, or notes using the **Project Information** window.

NOTE: You cannot edit the record type once a project contains one or more records.
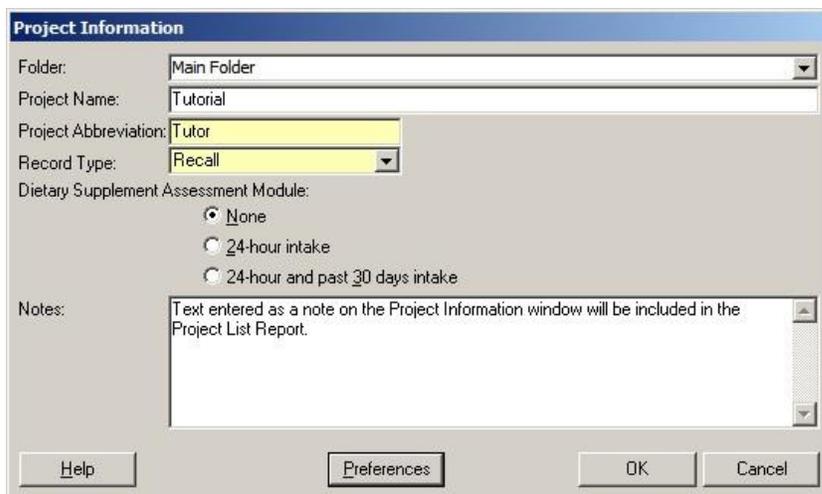
Project Information	
Folder:	Main Folder
Project Name:	Tutorial
Project Abbreviation:	Tutor
Record Type:	Recall

Dietary Supplement Assessment Module:
- ⦿ None
- ○ 24-hour intake
- ○ 24-hour and past 30 days intake

Notes: Text entered as a note on the Project Information window will be included in the Project List Report.

Help   Preferences   OK   Cancel

The following steps describe how to edit a project.

1. To change a project's name, abbreviation, or associated notes, either select **Project→Edit** from the **Folder, Project and Record Selection** window, or select a project from the **Project selection:** pane on the **Folder, Project and Record Selection** window.

2. When you receive the **Project Information** window, move the cursor to the field you want to change.

3. After making changes in the **Project Information** window, select the **OK** button. NDSR saves the changes and returns to the **Folder, Project and Record Selection** window.

4. To return to the **Folder, Project and Record Selection** window without saving your changes, either select the **CANCEL** button or press the **ESC** key.

Deleting a Project

Before you delete a project, backup any data you may want to retrieve at a later date. For more information about backing up NDSR data, refer to "*Chapter 9, NDSR Utilities*".

The following steps describe how to delete a project from NDSR.

1. In the **Project selection:** pane on the **Folder, Project and Record Selection** window, highlight the project you want to delete.

2. Either select **Project→Delete** or select the **DELETE** key.

3. When you receive the **Folder, Project and Record Management** dialog box, select the **YES** button.
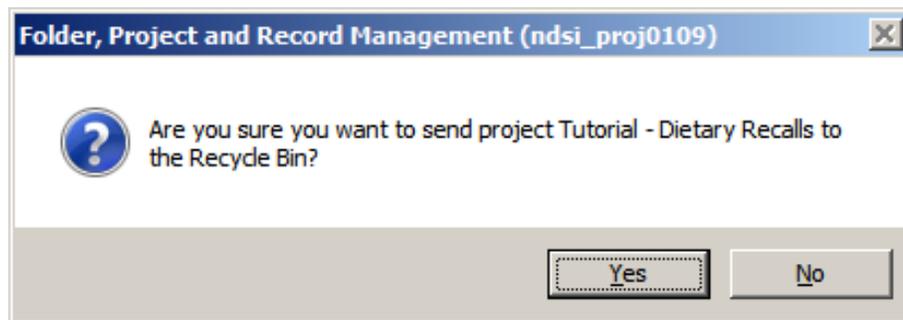
Creating a Folder

NDSR projects may be organized in a system of folders with up to three sub-folder levels. The NDSR **Main Folder** is a default folder and may not be edited. Folders, unlike projects may contain all record type methodologies allowing the user to organize project data by study.

The following steps describe how to create a folder in NDSR.

1. When you receive the **Folder, Project and Record Selection** window, either select **Folder→New Folder** or select the **NEW FOLDER** button on the **Folder selection** pane.

2. When you receive the **Folder Information** window, enter a folder name in the `Folder Name:` field (up to 80 characters).
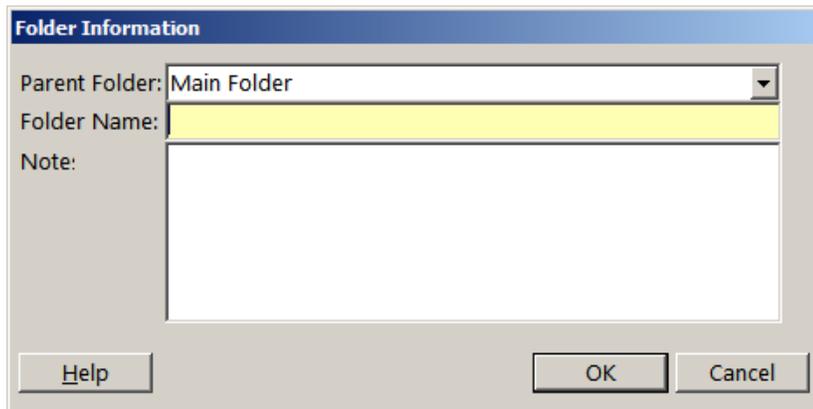
NOTE: All folder names must be unique.

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3. Type any relevant notes in the `Notes:` field.

4. Select the **OK** button to save your changes. If you do not want to save the changes, select the **CANCEL** button.

Moving Projects and Folders into Folders
Moving Projects

To move a project into an existing folder, right click on the project and select **Move** or select **Project→Move** to receive the **Move Project to Folder** window or use the mouse to drag and drop the project into the folder on the **Folder selection** pane.
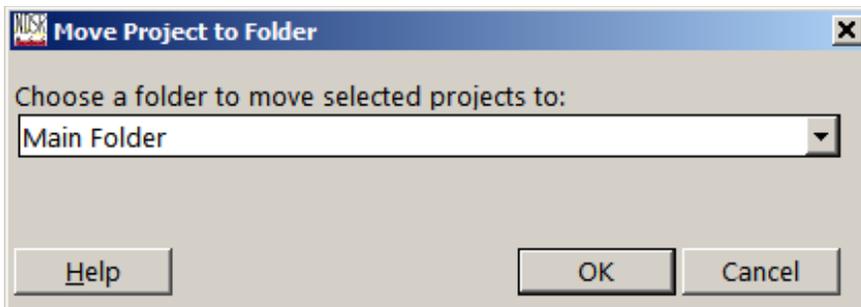
Moving Folders

To move a folder into an existing folder, right click on the folder and select **Move** or select **Folder→Move** to receive the **Move Folder** window or use the mouse to drag and drop the project into the folder on the **Folder selection** pane.
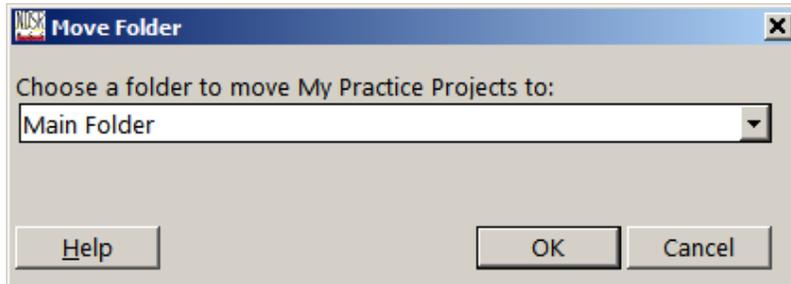
Deleting a Folder

Before you delete a folder, backup any data you may want to retrieve at a later date and empty the folder that you want to delete. For more information about backing up NDSR data, refer to "*Chapter 9, NDSR Utilities*".

The following steps describe how to delete a folder from NDSR.

1. In the **Folder selection:** pane on the **Folder, Project and Record Selection** window, highlight the project you want to delete.

2. Either select **Folder→Delete Folder** or select the DELETE key.

3. When you receive the **Folder, Project and Record Management** dialog box, select the YES button.
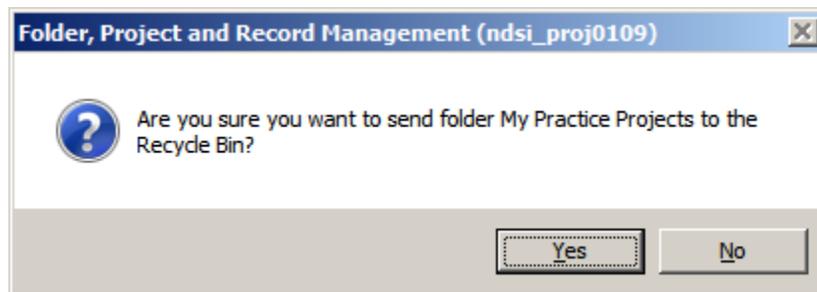
The NDSR Recycle Bin

The NDSR Recycle Bin is located on the **Folder, Project and Record Selection** window in the **Folder selection** pane. The Recycle Bin contains all folders, projects and records that have been deleted from NDSR. You may sort information in the **Deleted Folders** pane, **Deleted Projects** pane and the **Deleted Records** pane by selecting a column header with the mouse.

To permanently delete all information in the Recycle Bin, select the EMPTY RECYCLE BIN button.

To permanently delete specific folders, projects or records, highlight them and select the DELETE button.

To undelete specific folders, projects or records, highlight them and select the UNDELETE button.
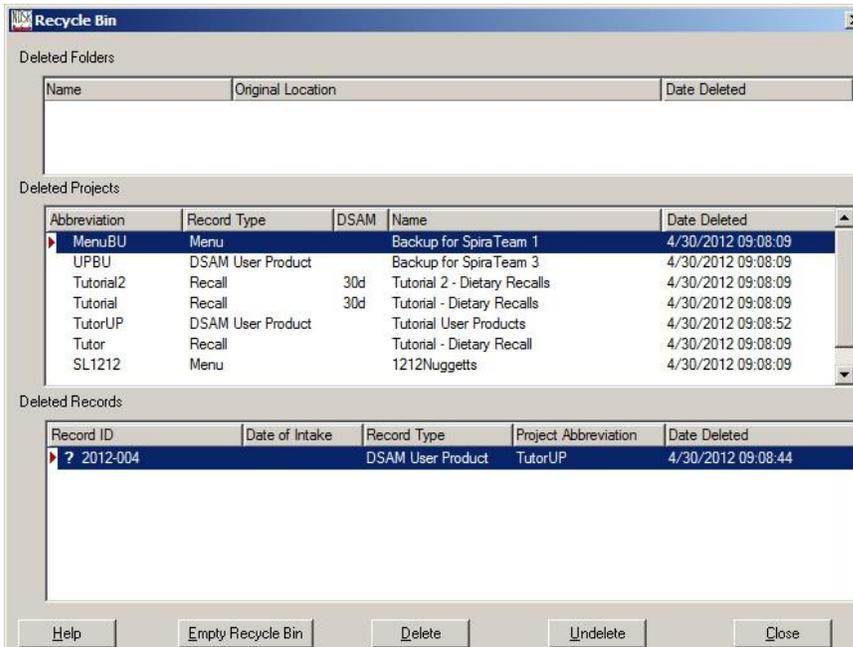
Searching for Records in NDSR

NDSR includes a search feature that allows you to search for projects and records in NDSR based on a variety of criteria. You may also create a report based on your search results.

The following steps describe how to search for projects and records in NDSR and create a **Record Search Report**.

1. To open the **Record Search** window, select **Project→Search** or **Record→Search** from the menu bar or select the search icon (flashlight) on the tool bar.
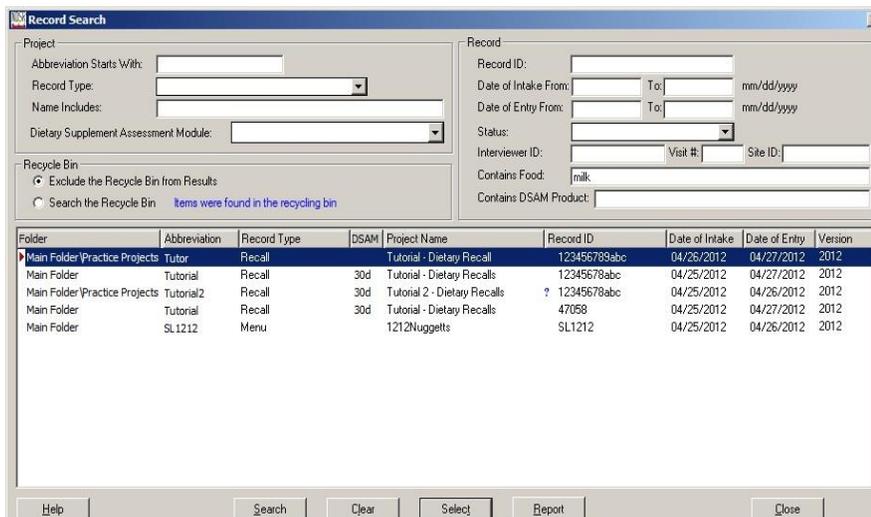
Enter in the **Project** pane any project search criteria.

The following fields can be set as project search criteria:
- `Abbreviation:` (project abbreviation)
- `Record Type:` (use the drop down list to select a record type)
- `Name Includes:` (type in part of the name of the project)
- `Dietary Supplement Assessment Module:` (use the drop down list to select type of DSAM record)

2. Enter in the **Record** pane any record search criteria.

The following fields can be set as record search criteria:
- `Record ID:`
- `Date of Intake From:` and `To:` (mm/dd/yyyy)
- `Date of Entry From:` and `To:` (mm/dd/yyyy)
- `Status:` (use the drop down list to select a record status)
- `Interviewer ID:`
- `Visit #:`
- `Site ID:`
- `Contains Food:`
- `Contains DSAM Product:`

3. In the **Recycle Bin** pane, the NDSR record search defaults to **EXCLUDE THE RECYCLE BIN FROM RESULTS**. If there are any records in the **Recycle Bin** that meet your search criteria, there will be a blue message stating that "Items were found in the recycling bin." To search the **Recycle Bin**, select the radio button.

4. Once you have entered your criteria, select the **SEARCH** button.

5. To create an NDSR **Record Search Report**, select the **REPORT** button. The legends that appear on the **Record Search Report** include: a blue ? for incomplete records, a red M indicating a missing food or supplement, an orange PN indicating a priority note, and a green √ that indicates the quality assurance status is complete.

6. To clear all search results, select the **CLEAR** button.

7. To view a specific record, highlight it and choose the **SELECT** button.

8. Select the **CLOSE** button to exit the **Record Search** window.

Reference Information

- For information about creating output files, refer to "*Chapter 8, Managing NDSR Output*".
- For information about backing up and restoring NDSR data, or using other programs for collecting record header information, refer to "*Chapter 9, NDSR Utilities*".
- For information about project protocol considerations, refer to "*Appendix 12, Protocol Considerations and Quality Assurance*".